Appendix
Station Area and Land Use Planning Elements
Description & Guidance

The following pages document each of the station area and land use planning elements, including the goal the element should aim to achieve, a description, examples or suggestions about what to include in the development of the element and what the deliverable should include. This information provides Station Area and Land Use Plan grantees with an expectation of the scope for each element and what MTC/ABAG will be looking for in submitted deliverables.

Station Area Profile

Goal: Brief initial report providing an overview of demographic and socio-economic characteristics of the station area, transit/travel patterns and use, physical aspects of the station area, as well as any known issues that will need to be considered or addressed in the planning process. Context for the relationship between the station area and the jurisdiction's surrounding area should be provided.

Data sources should include the US Census, as well as other planning efforts.

Results from the Station Area Profile should inform subsequent Station Area and Land Use Planning Elements.

Measures to be included or described in the Station Area Profile

- Population
- Age
- Ethnicity
- Language
- Place of birth and residence
- Disability
- Households
- Employment
- Income and poverty status
- Household tenure and costs
- Place of work
- Travel mode to work
- Vehicle availability
- Travel time to work
- Physical landscape (inventory of housing, jobs, parks, neighborhood amenities/retail, social services, schools/playgrounds, activity nodes, etc.)
- Known issues or concerns to be included in the planning process

Deliverable: Report containing the above-referenced measures describing the station area. The information contained in this report should be referenced throughout the planning process in the development of subsequent planning elements.

Community Involvement

Goal: Create a collaborative planning process with community stakeholders, including residents, business proprietors, property owners, transit agencies, neighborhood associations, non-profit or other community or faith-based organizations, etc. Special attention should be paid to involve community groups and minority, low-income, youth, renter, and non-English speaking populations. The purpose of the collaboration is to solicit comments from these stakeholders, review preliminary findings with them, and utilize their perspective in developing a vision for the station area. The outcome of successful community involvement is broad-based community support for the final Station Area and Land Use plan, as well as for the process to develop the plan.

Create a Community Involvement Plan

Before beginning the station area and land use planning process, develop a plan for community involvement. As a first step, refer to the Station Area Profile for an understanding of the residents and stakeholders to be engaged in the process. The plan should outline various strategies to involve these residents and stakeholders, and should provide for on-going oversight of the planning process, as well as opportunities for input at specific points in the process. Depending on the demographic make-up of the project area, translation of materials into languages other than English may be necessary and should be factored into the community involvement budget.

The involvement plan should identify:

a. Potential Technical Advisory Committee (TAC) and Citizens Advisory Committee (CAC) members, and/or a process for selecting members
b. Strategies to partner with local community organizations and engage community members (see below)
c. Strategies specific to engaging low-income communities and communities of color
d. Schedule of public meetings, TAC and CAC meetings, and other public events/meetings

Community Involvement Strategies

Strategies to consider incorporating into your community involvement plan are detailed below.

- Develop a *Citizens Advisory Committee (CAC) - required*
  CACs can provide a broad-based participation in the development of the plan and offer a mechanism for on-going oversight of the planning process. A CAC also allows the community to share ownership of the planning process as well as the final plan, and can help to create community buy-in.

- Develop a *Technical Advisory Committee (TAC) - required*
  A TAC provides input from partner agencies, including other city departments, transit providers, the congestion management agency and regional agencies.

- Partner, collaborate or *contract with local community-based organization(s)(CBO)*
  To engage the direct participation of residents in the project area, partnering or contracting with local community-based organizations that provide services to the residents may be an effective strategy. Local CBOs may be most familiar with how to reach their client base, particularly non-traditional participants in the process.

- Establish *project-specific fact sheets, telephone hotlines, posters, maps or websites*
  Offer a variety of ways the community can access information and/or provide feedback about the planning process.

- Attend *regularly scheduled meetings or public events in plan area*
  Getting on the agenda of regularly scheduled meetings, such as homeowners associations, community groups, rotary clubs, or places of worship offer an opportunity to discuss the planning process when interested stakeholders are already meeting rather than having them attend a separate meeting about the planning process. In addition, community events such as Farmer's Markets or street fairs can be used to distribute

project fact sheets, surveys or other information about the planning process. These events will also be a good opportunity to build the project mailing list for later project events.

- Conduct *focus groups and interviews*
  Focus groups or interviews offer an opportunity to obtain in-depth feedback from key stakeholders or groups.

- Distribute *surveys*
  Develop a project survey to both educate stakeholders and solicit feedback about needs, values and tradeoffs.

- Host project-specific *public meetings, workshops or open houses*
  Offer a range of options that accommodate busy schedules, allowing attendees to spend as much or as little time as they wish

- Involve *City Council and Planning Commissioners*
  Early involvement of elected and appointed officials can help ensure their buy-in and smooth the plan adoption process

- Include *developers*
  Developers and property owners bring an important perspective, particularly regarding market feasibility of plan alternatives

- Develop *photosimulations*
  Photosimulations, particularly of development alternatives, may be a useful tool to engage stakeholders, as well as help to provide visualization of densification

- Involve *local media*
  Coverage by local media can help secure coverage of planning efforts.

- Post-plan *follow-up*
  Potentially through the CAC, survey the community to identify areas of agreement, as well as what issues require additional attention

Groups to include in Community Involvement

- Residents – home owners and renters
- Businesses
- Property owners
- Local groups (i.e. neighborhood and business associations)
- Community and faith-based organizations (i.e. local non-profits serving residents in plan area)
- Seniors, including senior centers/housing
- Youth
- Non-English speaking population

Techniques for Involving Low-Income Communities and Communities of Color*

- Outreach in the community (flea markets, places of worship, health centers, etc.)
- Translate materials; have translators available at meetings as requested
- Include information on meeting notices on how to request translation assistance
- Robust use of “visualization” techniques, including maps and graphics
- Use of community and minority media outlets to announce participation opportunities

Deliverables:

a. A community involvement plan detailing who will be engaged and when, along with the strategies that will be used to engage them
b. Materials for distribution (draft and final)
c. Meeting minutes, public comment summaries, survey or focus group summaries

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* from MTC's 2010 Draft Public Participation Plan

Alternatives Analysis

Goal: Development of several land use alternatives or visions over the long term, their impacts upon the existing community and neighboring land uses, the feasibility of instituting each alternative, and the selection of a preferred development scenario. The alternatives should include an analysis of potentially incompatible land uses and resulting exposure issues.

Considerations:

- Specify the time horizon for the scenarios, taking into consideration the implementation timeframe of the station area and land use plan
- Review existing place type for the station area; does the place type change based on the community's vision in the preferred alternative?
- Develop options for different development scenarios early in the process to allow for discussion and input from community and key stakeholders (see Community Involvement)
- Scenarios may include
    * Minimum allowable density standards
    * Ridership forecasts based on different development scenarios
- How do different land uses relate to circulation in the station area, ridership, parking, open space, etc.
- What land uses are under consideration now vs. what uses are proposed for the future
- Land uses should consider zoning, form based code or both

Deliverable: Memo including:

- Alternatives considered
- Process for selecting the preferred alternative
- Description of the preferred alternative
- Supporting maps, i.e. land use map, circulation map, density/form map

Market Demand Analysis

Goal: An analysis of the future market demand for higher density-housing at all levels of affordability, retail, commercial and industrial (if appropriate) uses. The analysis should consider the existing market and outcomes in the short-term, as well as an assessment of trends with a long-range perspective. The trend analysis should reflect outcomes identified in the Alternatives Analysis.

Elements to include in Market Demand Analysis

- Delineation of primary and secondary (broader) market areas (set context for analysis)
- Assessment of *potential for employment* near station area
  - * Identify characteristics of current employment near station area based on land use, industry breakdown, and the type and frequency of nearby transit
  - * Describe trends in the current real estate market and expected patterns of growth based on reports from commercial real estate brokers or government agencies
  - * Analyze feasibility of various mixed-use components
  - * Project employment based on projected square footage of potential commercial development of each type (see below)

- Assessment of *potential for housing* near station area
  - * Assess current demographics (population, household type, age, income, etc), as well as projected growth and projected changes in trends (i.e., more households of a certain type)
  - * Consider tendency of various household types and age groups to locate near transit

- Assessment of *potential for commercial development* (i.e. retail, entertainment, etc.)
  - * Assess existing commercial development
  - * Describe trends in the current real estate market and expected patterns of growth based on reports from commercial real estate brokers or government agencies
  - * Cross reference with analysis of how much more retail could be supported by expected growth in housing and population.

- Projected absorption of housing at various income levels

Deliverable: A report containing current conditions, as well as short-term and long-term potential for employment, housing and commercial development in the station area. Analysis should link back to the preferred vision identified in the Alternatives Analysis

Affordable Housing and Anti-Displacement Strategy

Goal: Develop a strategy to provide existing and future plan area residents with a range of housing options that are affordable to households at all income levels. The strategy should describe the existing demographic and housing profile of the area, quantify the need for affordable housing, identify specific affordable housing goals for the plan, assess the financial feasibility of meeting the need for affordable housing, and identify strategies needed to meet the affordable housing goals.

To limit or prevent displacement in the area, the strategy should identify how non-subsidized affordable housing units in or neighboring the plan area may be impacted by the plan build-out. The plan should describe existing preservation policies to maintain neighborhood affordability and additional zoning changes or policies needed. The anti-displacement strategy may also include the maintenance and enhancement of small businesses, services and community centers that serve lower-income residents.

Elements to include in Affordable Housing and Anti-Displacement Strategy:

Assessment of Existing Conditions

- Describe the demographic characteristics of the existing population in the plan area, including factors such as income levels, ethnic/racial composition, and presence of low-income renters (who are at greatest risk of displacement)
- Describe the housing characteristics in the plan area, including factors such as housing tenure, household size, and housing affordability for both deed-restricted and market-rate units
- Describe market conditions that affect the provision of affordable housing, such as land availability and value, obstacles to development in the plan area, and existing affordable housing policies (e.g., inclusionary zoning, rent control or stabilization policies, housing preservation programs, etc.)

Quantification of Affordable Housing Need

- Quantify the expected need for affordable housing, by income level, in the plan area based on the characteristics of the existing and expected future population
- The statement of need should not be limited by estimates of what seems feasible

Identification of Goals

- Consider goals such as:
    - No net loss of affordability in the plan area
    - Total number of affordable units, by income level, that will be accommodated in the plan area
    - Target for percentage of total units that are affordable
- Demonstrate consistency with the jurisdiction's Regional Housing Need Allocation and the sites and policies identified in the Housing Element

Feasibility Analysis

- Assess the amount of affordable housing, by income level, that is likely to be produced by the market
- Estimate the public financial burden and the private costs required to meet the identified housing need
- Identify potential funding sources available to develop affordable housing
- Identify the "gap" between the dollar amount needed for affordable housing and the potential sources available

Implementation Strategy

- Identify specific strategies to retain existing affordable units
- Specify the location and type of units (size, tenure, etc.) to be developed in the plan area
- Identify funding sources that will be used to preserve or add affordable housing
    - Redevelopment set-aside
    - Other local sources (bonds, impact fees, housing trust fund, etc.)
    - State and Federal sources (HOME, CDBG, tax credits, grants, etc.)

    - Other

- Identify policies that will be used to preserve or add affordable housing
    - Inclusionary housing
    - Housing trust fund
    - Reduced parking standards
    - Rehabilitation programs
    - Land trusts
    - Foreclosure mitigation
    - Other

- Identify policies that will be used to avoid displacing existing residents
    - Engagement of communities likely to be displaced
    - Economic development (locally owned businesses, local hire, new area jobs that meet residents' skill levels)
    - Enhancement of community centers and facilities

Deliverable: A report that outlines the plan's approach to providing a range of affordable housing options to existing and future residents, based on the elements identified above.

Multimodal Station Access & Connectivity Component

Goal: Strategies for improving bus access to rail stations and ferry terminals and frequency of feeder services (in consultation with transit providers) as well as pedestrian, bicycle and auto access and safety. Multi-modal connections between the transit stations and high-density housing, surrounding neighborhood amenities, activity nodes, and open space should be emphasized. This should apply throughout the station planning area boundaries (include significant nodes outside plan area boundaries).

Pedestrian Access & Circulation (see also, Pedestrian-Friendly Design Standards)

Identify pedestrian access and circulation patterns between station/terminal, local transit, neighborhood amenities and activity nodes in the station area. Utilizing the Station Area Profile and Alternatives Analysis (for future land uses), show the most heavily pedestrian traveled routes in your station area, emphasizing pedestrian safety.

- Identify primary pedestrian routes
- Consolidate and minimize driveways
- Accommodate ADA requirements

Bicycle Access & Circulation

Incorporate county-wide and local bike plans, station/terminal access for bicycles, bicycle parking and storage. Identify circulation pattern to adjacent activity centers and nodes. Show the bicycle network identified by class in the station area. Identify connections to regional routes.

- Incorporate Countywide and City Bike Plans
- Bike lane treatments at intersections
- Bike racks and storage
- Bike lane width and treatment, designation class I-III and sharrows

Transit Connectivity

Identify and locate feeder bus service/hubs at the station/terminal, identify various lines serving the station, its route and stops within the station area.

- Bus stops at intersections
- Bus Shelters
- Bus bulb outs
- Intermodal access, including way-finding signage, accessible transit information, real-time technology, schedule coordination, fare coordination and last-mile connecting services
- Close and early consultation/coordination with all affected transit operators

Auto Circulation

Locate vehicular routes from core station area parking structures/ lots to arterials, expressways, and freeways. Minimize auto and pedestrian/bicycle conflicts.

- Identify auto intensive land uses
- Keep vehicular circulation to a minimum in pedestrian core areas
- Relocate auto oriented land uses in highly pedestrian trafficked areas. Including vehicular entrances of parking structures

Deliverable: Multimodal station access and connectivity plan/memo and pedestrian-friendly design standards or similar (See Pedestrian-Friendly Design Standards)

Pedestrian-Friendly Design Standards

Goal: Building, open space and street design standards that focus on pedestrian-oriented design that enhances the walking environment and increases pedestrian comfort and convenience as well as the safety and security of transit patrons in and around the station plan area.

Background:
In preparation for the TLC 2010 Capital Call for Projects, MTC developed design guidance utilizing context-sensitive design solutions. The guidance suggests ranges (minimum and maximums) for a variety of design elements, which can be viewed as best practices, and can be considered a base from which to work for the design elements included in the Station Area and Land Use plan.

Possible approaches that prioritize pedestrians:
Pedestrian Friendly Design Guidelines
Form Based Code
Street Design Guidelines
Context Sensitive Solutions

Considerations to prioritize pedestrians include:

- Sidewalk width
- Block Length 300'-400'
- Mid-block crossings (controlled)
- High visibility crosswalk treatments at all legs of intersections
- Pedestrian refuge islands
- Pedestrian-scaled lighting
- Curb return radii
- Audible signals
- Curb extensions (Bulb outs)
- ADA compliant ramps
- Street trees & planters
- Street furniture and fixtures
- Max. Travel lane width
- Way Finding signage
- 25 mph Speed Limit in Pedestrian Zones

Deliverable – See Multimodal Station Access and Connectivity Component

Accessible Design

Goal: Create an accessibility plan for people with disabilities, ensuring fully accessible transit stations, accessible paths of travel between the stations and surrounding areas, and visitable and habitable housing units adjacent to the station where feasible. If new housing is proposed within the station area, at least 10% of townhomes should be habitable by persons with disabilities. Accessible paths of travel between the station and essential destinations within the station area should take into consideration width of sidewalks, presence of curb cuts, physical barriers that would prevent persons with mobility limitations from access and enhancements that would facilitate access.

Key Definitions

- *Accessible*: Housing and routes to transit that meet the needs of an individual of a person with mobility limitations
- *Adaptable*: Housing that allows some features of a building or dwelling to be readily changed to be accessible
- *Habitable*: Dwelling where a person with a disability can live with an accessible bedroom
- *Visitable*: Dwelling where a person with a disability can visit with an accessible restroom
- *Townhome*: A multi-story residence that is connected by a common wall to another residence
- *Universal Design (UD)**:
    - The design of products and environments to be usable by all people, to the greatest extent possible, without adaptation or specialized design.
    - A user-friendly approach to design in the living environment where people of any culture, age, size, weight, race, gender and ability can experience an environment that promotes their health, safety and welfare today and in the future.

Considerations when developing the Accessibility Plan

- Do new housing units (including townhomes) in the station area incorporate universal design, or are habitable by persons with mobility limitations (e.g have accessible bathrooms and bedrooms, or can be converted through universal design)

- Does your jurisdiction have a policy to incorporate universal design in new housing developments in the project area? If yes, what is the policy and how will it apply to the station area?

- Describe the path of access to and from transit and essential services within a ½ mile from existing and planned housing units in the station area. Description should include width of sidewalks, presence of curb cuts, physical barriers that would prevent persons with mobility limitations from access, and enhancements that would facilitate access.

Deliverable: Memo containing how the station area will accommodate persons with disabilities, both in path of travel to/from transit and surrounding destinations, as well as habitable and visitable housing units.

* from Universal Design Alliance, http://www.universaldesign.org/universaldesign1.htm

Parking Demand and Management

Goal: Create a parking demand and management element that aims at reducing parking demand and encouraging transit, walking, and bicycling. Special attention should be paid to applicable TOD-oriented parking strategies for local adoption based on MTC's Parking Toolkit and other appropriate guidance. This element should be based on a thorough analysis of existing and future parking demand within the multi-modal context of the station area, and should provide specific guidance for local planning, zoning, and parking management and pricing efforts to give priority for improved walkability, transit access, and bicycling quality over the use of automobiles for solo travel in this area.

Steps for Developing a Station Area Parking Demand and Management Element

Steps to consider in developing your parking management plan are detailed below. These steps are described in the MTC Parking Toolbox. Examples of parking management plans are available in the Parking Study under "case studies".

1. Working with your community, define your community goals that will serve as the basis for parking policy recommendations. Some goals to consider include:
   - Optimize use of land for housing and development
   - Maximize the use of parking areas for public parking and mixed use development
   - Evaluate/meet current/future parking needs efficiently
   - Determine appropriate parking rates
   - Support/encourage alternatives to driving
   - Support/encourage pedestrian/bike circulation connectivity to the station
   - Support/encourage economic development

2. Collect information about existing parking and circulation policies and plans for the station area
   - Work with city staff to determine the relevant documents. Key parking policies, development regulations and requirements may be incorporated into the General Plan, Zoning Ordinances, General or District Design Guidelines, Specific Plans, and Overlay Ordinances, and/or other city documents.
   - Work with all the transit agencies that stop at the station to determine their parking policies and goals.
   - City staff, CMA staff, regional agency staff and community members should be consulted to determine relevant transportation policies, such as regional or county bicycle lanes, "last mile" policies for the station, and other specific local non-auto priorities.

3. Develop a plan for data collection; collect and analyze the data
   - Key field data specifically about parking includes
     a. Parking spaces by location and status (private, public, reserved/shared, free/paid),
     b. Parking occupancy rates by location (both on-street and off-street by weekday/ weekend, by time of day, by block, lot or garage)
     c. Parking turnover times, prices and price structure
     d. Trends in parking usage and public perceptions regarding local parking.
   - Combine and map this data with information from the other elements of the station area and land use plan, including market demand, alternatives analysis, access and connectivity, including:
     a. Transportation facilities - roads, transit, pedestrian, bicycle, and car sharing
     b. Key users and uses of the transportation system by general characteristics – commuters into the station area, commuters out of/through the station area, students coming to or leaving the area, other major populations and attractors. Key origins, destinations and modes (total, per capita VMT, transit, walk/bike).
     c. Current and projected future residents characteristics, including incomes, family composition, and auto ownership rates.

4. Explore potential strategies that might be effective in the station area.
   Based on the community's goals, features of the station area, characteristics of the populations using the area, and parking supply and demand from above, review the parking management strategies from the MTC Parking Toolbox and other appropriate references for applicability. Strategies for regional centers, city

centers/urban neighborhoods and transit neighborhoods should be of particular use for station area and land use planning.

- It may be useful to develop goals and policies specific for different zones, such as for the station, the immediate surround (e.g., 10 minute walking distance), and the larger station area. For example, the station may be designated be a pedestrian priority zone, and assigned appropriate strategies to promote walking as the priority mode.
- For the station and immediate surround, consider Transit /TOD policies of transit incentive programs, walkability and wayfinding, bicycling and carsharing strategies, and transit friendly parking design.
- For the immediate surround and larger station area, consider policies such as reduced parking requirements and unbundling, shared parking, commuter benefit ordinances, coordinated on-street and off-street parking pricing management, and business or residential district programs.
- Note that construction of new land uses (housing, retail, offices, etc) on transit station parking lots can be a very successful approach for community building, but that the access mode for the transit station must be addressed carefully with the transit agencies. While a replacement rate for parking lost to new development is not governed by a one-for-one replenishment requirement, equivalent or higher transit usage rates are key to an agreement on levels of replacement parking.
- Any recommendations for new parking garages for transit stations developed under station area and land use planning must be accompanied by an analysis of the demand under conditions of user payment for the facility, and a cost-benefit analysis comparing the proposed garage to other approaches for providing access. Note that under the MTC TLC program, project sponsors requesting funds for parking structures must have completed an analysis of the costs and benefits of the parking structure using parking management strategies from the MTC Parking Book or other locally appropriate TDMs. Funding of parking structures requires implementation of best practices parking strategies/TDMs, to be developed in concert with MTC.

5. Work with the community to examine strengths and weaknesses of various strategies, and to develop a set of recommended strategies, as per the community involvement process.
    - Community input, including local residents, businesses, developers, and other station area users is essential to the success of the parking component of the station area and land use plan. Examine tradeoffs and implications of various packages of strategies, and develop recommendations.

Examples: Eight case studies for local parking management plans are including in the MTC Parking Study; while every location has unique characteristics and needs, these may be useful in developing a local approach. http://www.mtc.ca.gov/planning/smart_growth/parking_seminar.htm These case studies cost approximately $30,000 each.

Deliverable: Parking management plan/memo incorporating steps and elements listed above

Infrastructure Development and Budget

Goal: Describe existing public infrastructure (streets and roadways, sidewalks, bike lanes and racks, utilities, street furniture, street trees, parking, stormwater management, etc.) and public facilities (transit stations/shelters, libraries, parks, centers, schools, etc.) within the station area, determine improvements needed to meet the demands of the existing and anticipated service population, develop cost estimates, and identify potential funding mechanisms for necessary improvements and maintenance.

Considerations:

- Describe existing public infrastructure and facilities and highlight strengths/weaknesses in the Station Area Profile
- Incorporate findings from the Market Demand Analysis
    - For example, if the Market Demand Analysis finds that higher density housing can be accommodated, will utility pipe upgrades be needed?
- Factor in regulatory requirements for new development (e.g. stormwater or fire protection)
- Specific mapping or analysis may be needed to fill in data gaps to assess infrastructure needs and identify service factors for estimating costs (e.g. cost per service population or per user)
- Conduct a fiscal impact analysis to determine the impact of the plan on public services and determine appropriate financing strategies to meet costs
- Prioritize/phase improvements and include in Implementation Plan and Financing Strategy

Deliverable: Memo outlining infrastructure development and budget

Implementation Plan and Financing Strategy

Goal: List action items necessary to implement the goals of the plan and identify responsible department, cost estimates, potential revenue sources, and timeframe for completion.

Considerations:

- Identify action items for each topical section (e.g. land use or connectivity) of the plan to implement the goals of that section and for overall plan implementation, such as programmatic changes to incorporate new programs.
- Action items should be categorized and listed in a logical format (e.g. bulleted list and/or table)
- Each action item should be assigned a time frame for implementation (e.g. short 0-2 years, medium 3 to 5 years, long-term 6+ years) to easily identify immediate next steps and longer term priorities.
- Each action should have a cost estimate and potential funding sources
- Each action item should be assigned to a responsible department
- Evaluate opportunities for neighborhood groups/other organizations to implement/assist with projects (e.g. street clean-up)
- Establish a mechanism for annual review of plan implementation progress and priorities (e.g. annual staff status report to planning commission/city council or have each department review implementation action items and incorporate into their departmental budget review process)

Deliverable: Implementation Plan with Financing Strategy

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Preparation for Plan Implementation

Goal: Prepare all necessary documents and changes at the time of plan adoption to proceed immediately with plan implementation, such as Program level EIR

- Zoning changes
- General Plan amendments
- Developer agreements